

2023 MEMBER SURVEY FOLLOW-UP ANALYSIS

March 29, 2024

UPDATE OVERVIEW

- Recap of research
- Follow-up requests and edits
 - Response rate comparison
 - Standardization of satisfaction graph
 - Adjusted graph for value
- Additional analysis conducted
 - Heavy user satisfaction versus all user satisfaction
 - Value response by age, length of ownership, resident type and STR
 - Value response by household characteristics, ownership type
 - Open-ended analysis of themes and quantity by question
- Next Steps



Purpose of Research

Measure opinions among Tahoe Donner homeowners to understand....

- New residents – who are they
- Property usage
- Member attitudes toward amenities
- Satisfaction and value of TD
- Opportunities for improvement



Methodology

- 20-minute online survey distributed by email
- Fieldwork conducted Dec. 4 to Dec. 26, 2023
- Sample consisted of owners (or family members of owners) or renters of a Tahoe Donner property
- **Sample is** distributed as follows:

1,484

Total Interviews*

429

Permanent
Resident
Owners*

1,055

Second
Homeowners*

147

Past 2-Year
Owners & Renters

15

Renters
Low sample



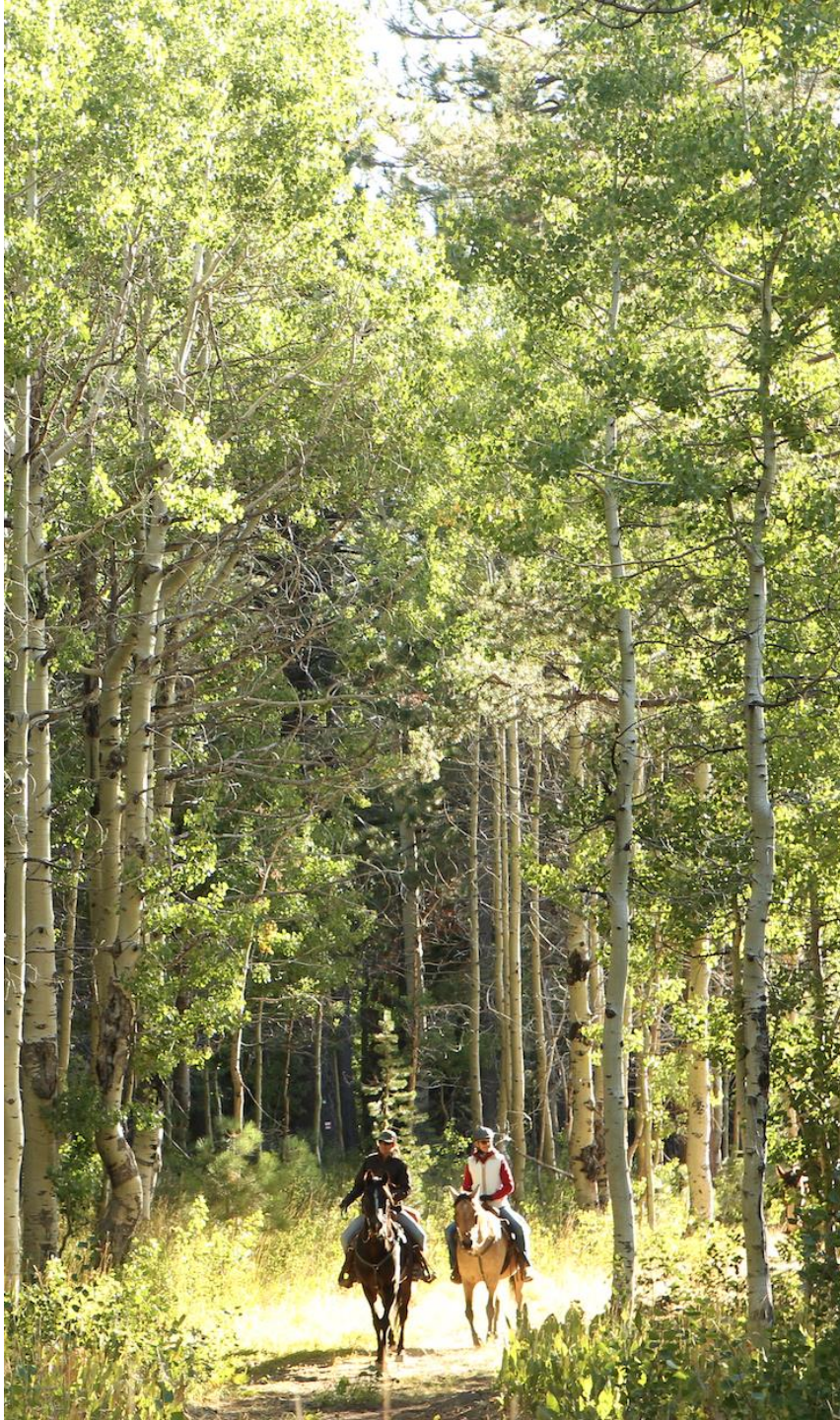
•Although responses are lower than past years, we are hitting a response rate of 13% (18% in 2021, 14% in 2019). This is well above industry standard and reflects the strong engagement of the TD community.

•*2021: 1879 total respondents, 485 permanent residents, 1394 second homeowners; 2019: 1590 total respondents, 254 permanent residents, 1318 second homeowners

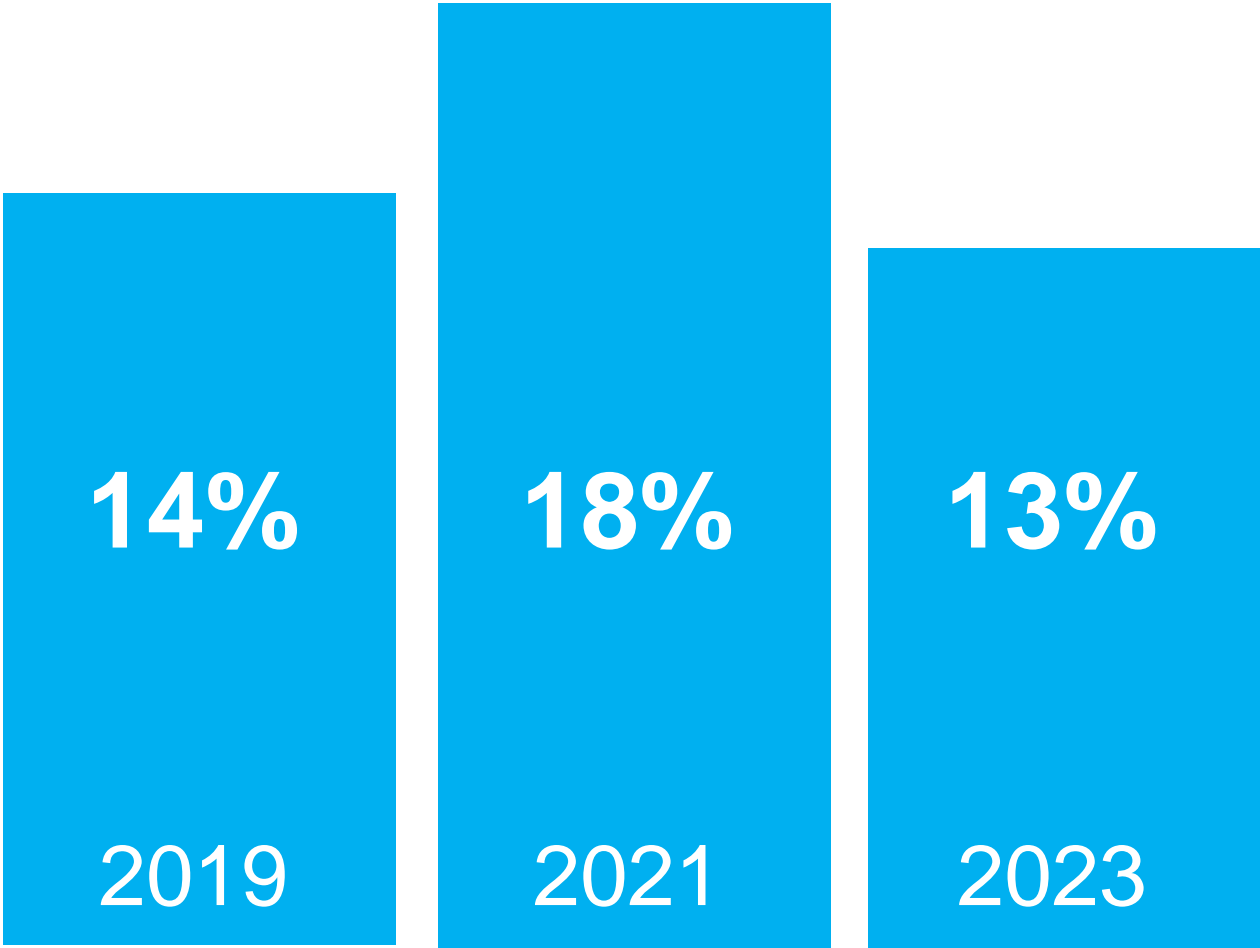
•Note: Margin of Errors – Total: 2.5%, Permanent Resident Owners: 4.7%, Second homeowners: 2.9%, Past 2-Year Owners & Renters: 8.1%

COMPLETE SURVEY FINDINGS PRESENTED AT THE FEB. 23, 2024 REGULAR BOARD MEETING



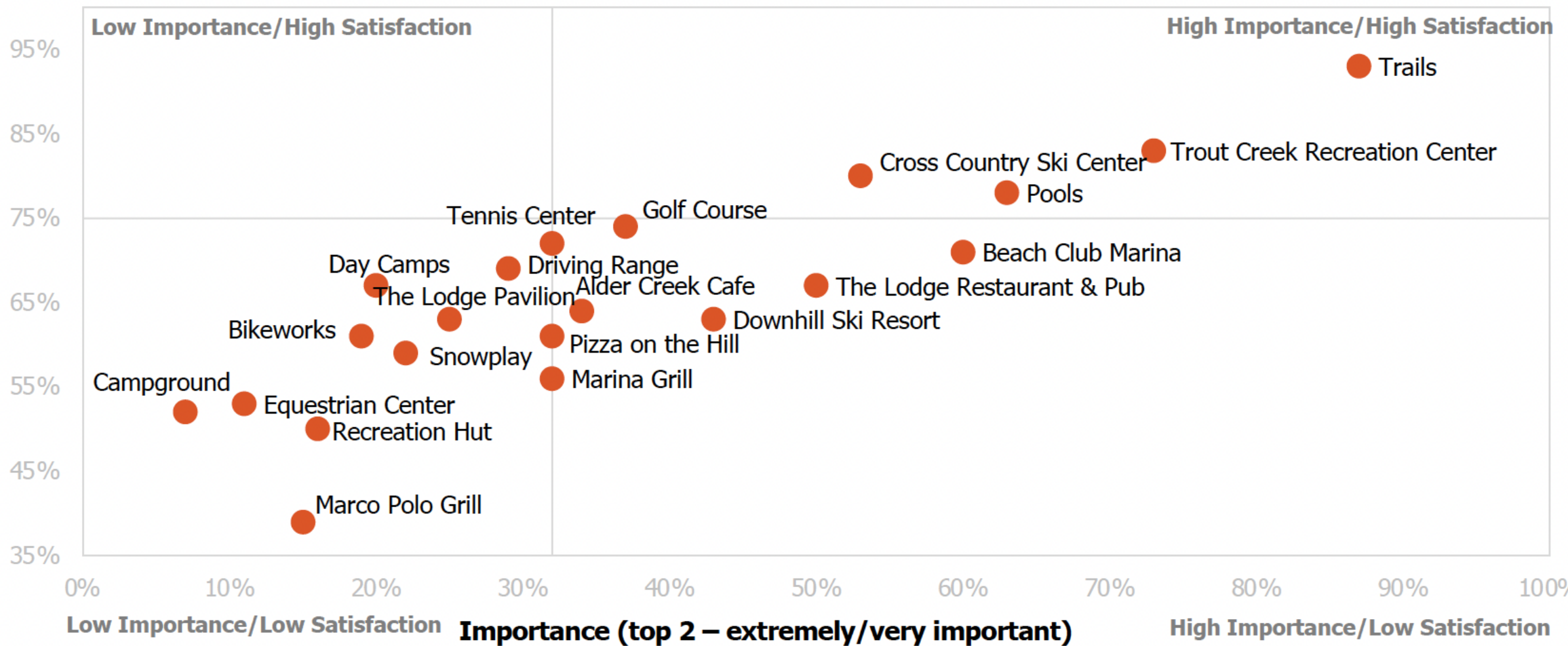


MEMBER SURVEY RESPONSE RATE BY YEAR



Importance vs. Satisfaction – Detailed view 2023

Satisfaction (top 2 – very/somewhat satisfied)

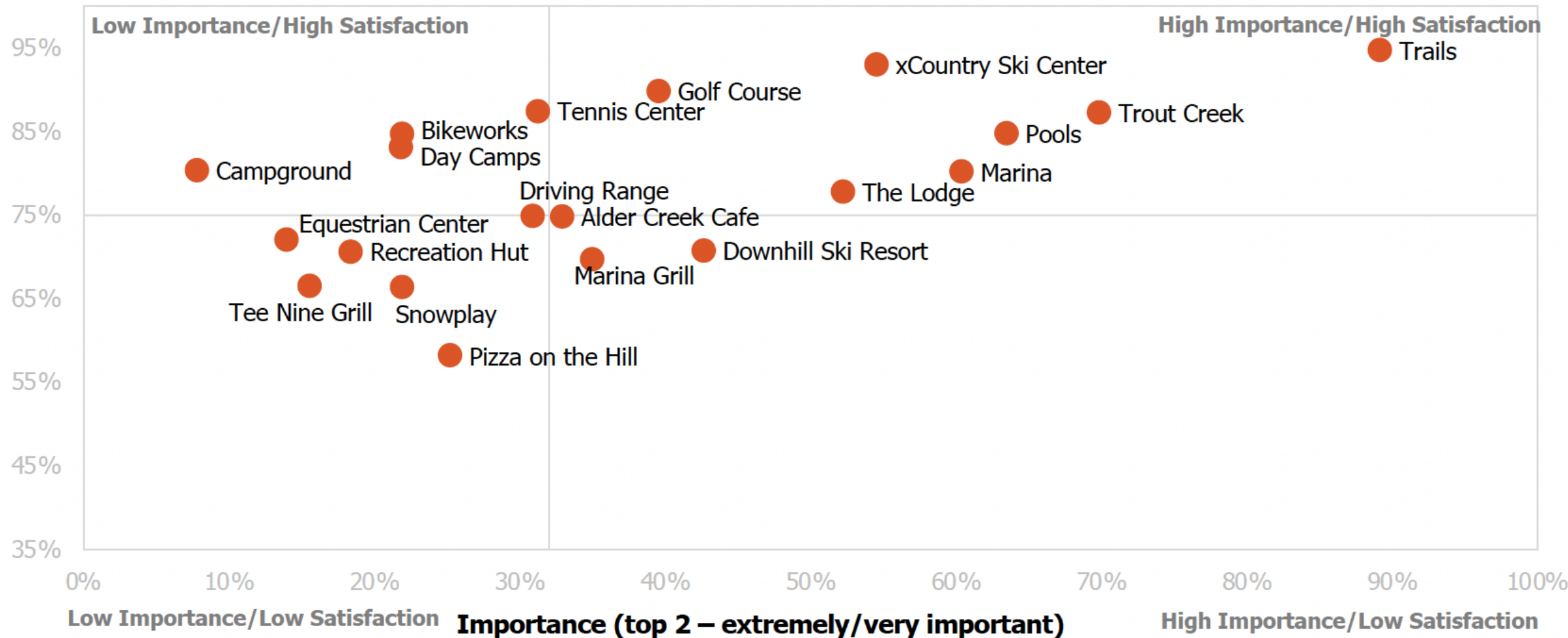


C6: How important are each of the following amenities to you? (asked of everyone, top 2 box on 5-pt importance scale plotted)
 C4: How satisfied are you with each of the following amenities? (asked of users of each amenity, top 2 box on 5-pt satisfaction scale plotted)
 Note: crosshairs (axes) are based on average scores for importance and satisfaction



Importance vs. Satisfaction – Detailed view 2021

Satisfaction (top 2 – very/somewhat satisfied)



C6: How important are each of the following amenities to you? (asked of everyone, top 2 box on 5-pt importance scale plotted)

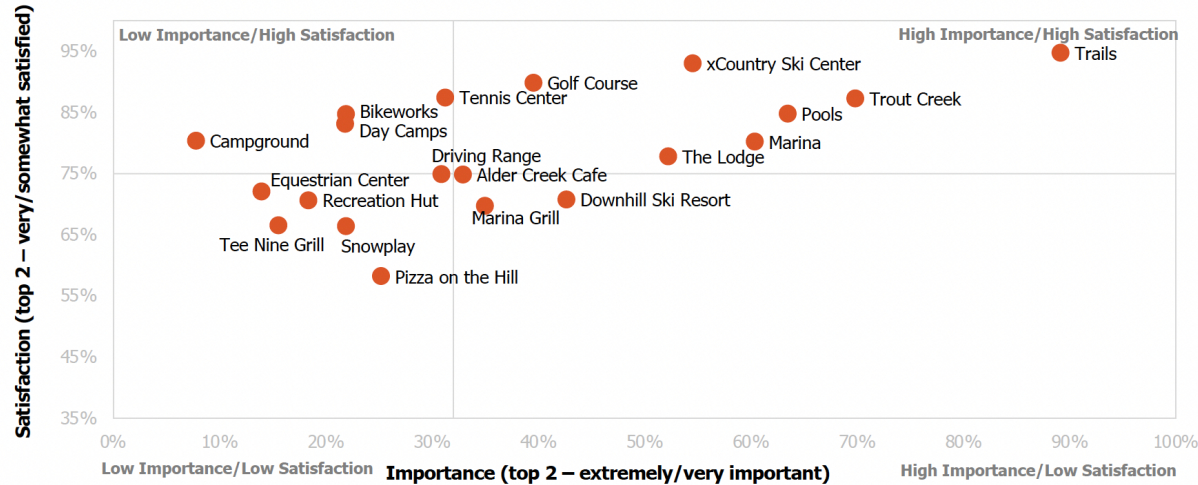
C4: How satisfied are you with each of the following amenities? (asked of users of each amenity, top 2 box on 5-pt satisfaction scale plotted)

Note: crosshairs (axes) are based on average scores for importance and satisfaction



AMENITY SATISFACTION SIDE-BY-SIDE VIEW

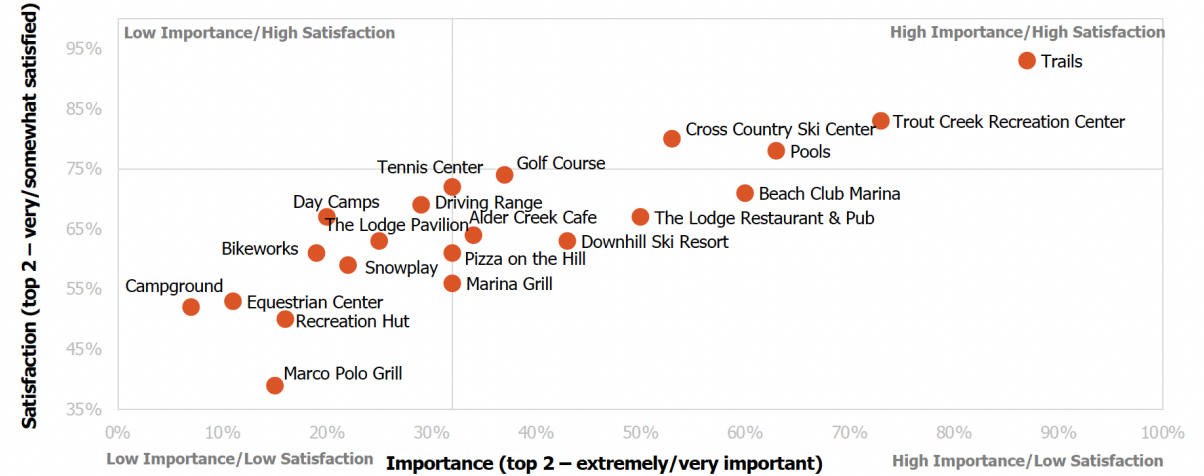
Importance vs. Satisfaction – Detailed view 2021



C6: How important are each of the following amenities to you? (asked of everyone, top 2 box on 5-pt importance scale plotted)
 C4: How satisfied are you with each of the following amenities? (asked of users of each amenity, top 2 box on 5-pt satisfaction scale plotted)
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Importance vs. Satisfaction – Detailed view 2023



C6: How important are each of the following amenities to you? (asked of everyone, top 2 box on 5-pt importance scale plotted)
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 Note: crosshairs (axes) are based on average scores for importance and satisfaction



SATISFACTION OF ALL USERS VS. HEAVY USERS

Amenity	Total Satisfaction (Very / Somewhat Satisfied)	Satisfaction of Heavy Users (Very / Somewhat Satisfied)	Definition of Heavy Users	Percent of Total
Trails	93%	96%	Uses 50+ times a year	19%
Trout Creek Recreation Center	83%	95%	Uses 40+ times a year	17%
Cross Country Ski Center	80%	96%	Uses 30+ times a year	11%
Pools	78%	93%	Uses 20+ times a year	19%
Golf Course	74%	95%	Uses 10+ times a year	12%
Tennis Center	72%	94%	Uses 20+ times a year	8%
Beach Club Marina	71%	91%	Uses 20+ times a year	12%
Driving Range	69%	88%	Uses 10+ times a year	13%
The Lodge Restaurant & Pub	67%	88%	Uses 10+ times a year	20%
Day Camps	67%	81%	Uses 5+ times a year	5%
Alder Creek Cafe	64%	87%	Uses 10+ times a year	14%
Downhill Ski Resort	63%	83%	Uses 10+ times a year	15%
The Lodge Pavilion (back patio area)	63%	87%	Uses 5+ times a year	18%
Bikeworks	61%	85%	Uses 5+ times a year	7%
Pizza on the Hill	61%	92%	Uses 10+ times a year	11%
Snowplay (tubing and sledding area)	59%	83%	Uses 5+ times a year	7%
Marina Grill (Beach Club Marina)	56%	79%	Uses 10+ times a year	12%
Equestrian Center	53%	79%	Uses 3+ times a year	6%
Campground	52%	75%	Uses 3+ times a year	6%
Recreation Hut (bocce, archery, sand volleyball, etc.)	50%	84%	Uses 5+ times a year	8%
Marco Polo Grill (Trout Creek Pool)	39%	66%	Uses 5+ times a year	8%

KEY TAKEAWAY
Heavy users have a much higher satisfaction rating than compared to all users.

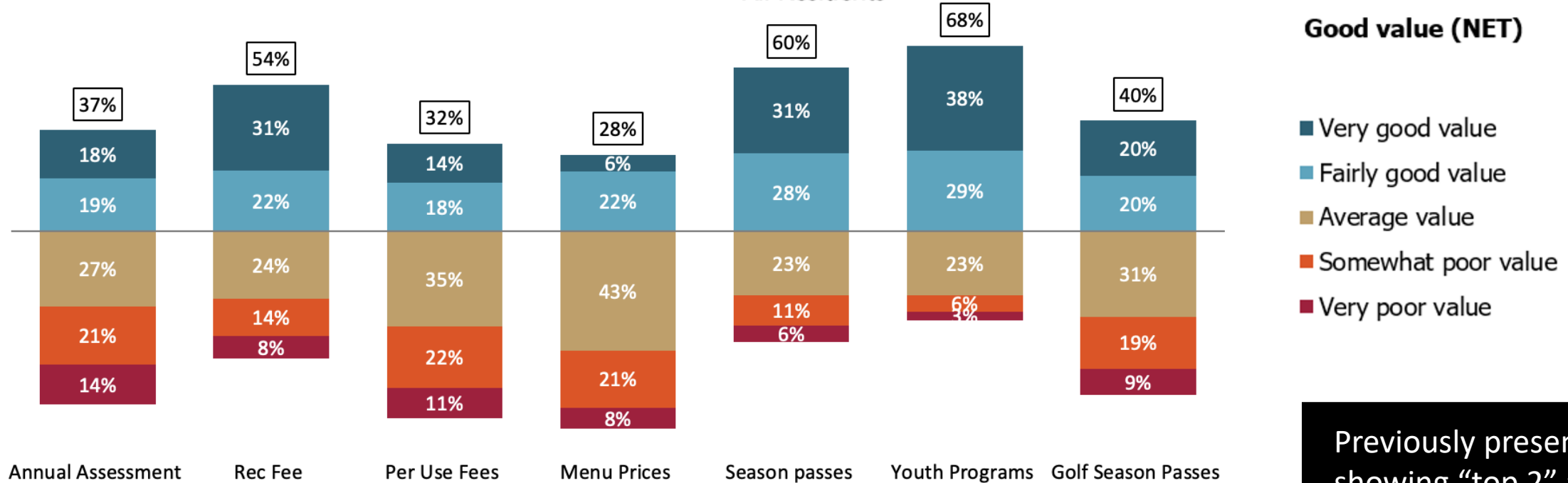
Note: Definition of heavy user must vary by amenity due to varying quantity of operating days.

Value of TD (w/ Don't Knows Removed)

Finn has asked value perceptions using this same scale in over 1,000 studies. While we don't have norms specific to HOA fees, our benchmarks can help to interpret the strength of TD value perceptions. A top 2 box score above 56% is in the top 20% of Finn's database, indicating very high value perceptions. A score under 40% is considered below average and a score below 32% places in the bottom 20%.

Value of Tahoe Donner

All Residents



Previously presented as only showing "top 2" and did not exclude "don't know/not applicable." Greatly impacted results for ski season passes, youth programs and golf season passes.



C1: How do you feel about the value of each of the following?

REVIEW VALUE QUESTIONS BY DEMOGRAPHIC GROUPS

[C1t2] (...) How do you feel about the value of each of the following? (Select one for each) (Top 2 Summary)

	Total Respondents	Age			Length of Ownership				Resident Type		STRs	
		18-49	50-64	65+	2 years or less	3-9 years	10-19 years	20+ years	Permanent Residents	Second Homeowners	Short-Term Renters	Non Short-Term Renters
		A	B	C	D	E	F	G	H	I	J	K
BASE-Total Respondents	1484	256	566	623	147	397	339	598	429	1055	109	1375
(1) Tahoe Donner 2023 Annual Assessment (\$2,624)	535	90	214	225	60	153	121	201	167	368	33	502
	36.1%	35.2%	37.8%	36.1%	40.8%	38.5%	35.7%	33.6%	38.9%	34.9%	30.3%	36.5%
(2) Tahoe Donner 2023/24 Recreation Fee (\$295 for up to two people or \$460 for all members on the account)	761	139	323	288	86	212	173	288	259	502	47	714
	51.3%	54.3%	57.1%	46.2%	58.5%	53.4%	51.0%	48.2%	60.4%	47.6%	43.1%	51.9%
(3) Per use fees at Tahoe Donner amenities, which include the following: (A)\$12 for members without paid Rec Fee (B)\$15 for accompanied guests (C) \$20 for unaccompanied guests	452	71	193	177	34	125	109	182	147	305	23	429
	30.5%	27.7%	34.1%	28.4%	23.1%	31.5%	32.2%	30.4%	34.3%	28.9%	21.1%	31.2%

Proportions/Mean: Columns Tested (5% risk level) - A/B/C - D/E/F/G - H/I - J/K - L/M/N/O/P/Q/R/S/T - U/V/W - X/Y/Z Overlap formulae used. * small base

REVIEW VALUE QUESTIONS BY DEMOGRAPHIC GROUPS

[C1t2] (...) How do you feel about the value of each of the following? (Select one for each) (Top 2 Summary)

	Total Respondents	HH Type									Ownership Type		
		Family w/Children	No Children in HH	Young Children (ages 0-4)	School age Children (ages 5-18)	Adult Children at home	Empty Nesters	Retired	Locally employed (FT + PT)	Work from Home	Sole Owner	Shared Ownership with spouse	Ownership with extended family or beyond
		L	M	N	O	P	Q	R	S	T	U	V	W
BASE-Total Respondents	1484	803	681	283	521	146	580	785	189	444	259	1015	130
(1) Tahoe Donner 2023 Annual Assessment (\$2,624)	535	270	265	110	183	42	230	285	73	164	76	395	38
	36.1%	33.6%	38.9%	38.9%	35.1%	28.8%	39.7%	36.3%	38.6%	36.9%	29.3%	38.9%	29.2%
			LP	LP			LP		P	P		UW	
(2) Tahoe Donner 2023/24 Recreation Fee (\$295 for up to two people or \$460 for all members on the account)	761	372	389	141	243	61	307	382	112	242	124	536	52
	51.3%	46.3%	57.1%	49.8%	46.6%	41.8%	52.9%	48.7%	59.3%	54.5%	47.9%	52.8%	40.0%
			LNOPQR				LOPR		LNOPR	LOPR		W	
(3) Per use fees at Tahoe Donner amenities, which include the following: (A)\$12 for members without paid Rec Fee (B)\$15 for accompanied guests (C) \$20 for unaccompanied guests	452	219	233	69	141	37	182	240	56	125	67	324	32
	30.5%	27.3%	34.2%	24.4%	27.1%	25.3%	31.4%	30.6%	29.6%	28.2%	25.9%	31.9%	24.6%
			LNOPRI				LN	LN					
(4) Season passes at Tahoe Donner ski resorts	595	317	278	123	223	63	248	309	78	188	94	426	47
	40.1%	39.5%	40.8%	43.5%	42.8%	43.2%	42.8%	39.4%	41.3%	42.3%	36.3%	42.0%	36.2%
				L									
(5) Golf season passes	203	109	94	37	58	23	76	107	24	37	41	131	22
	13.7%	13.6%	13.8%	13.1%	11.1%	15.8%	13.1%	13.6%	12.7%	8.3%	15.8%	12.9%	16.9%
			I	I		I	I	I					
(6) Youth programs such as summer day camps and learn-to-ski programs	437	303	134	107	213	48	146	234	46	122	80	288	41
	29.4%	37.7%	19.7%	37.8%	40.9%	32.9%	25.2%	29.8%	24.3%	27.5%	30.9%	28.4%	31.5%
		MQRST		MQRST	LMQRS I	MQ	M	MQ		M			
(7) Menu prices at Tahoe Donner restaurants	376	222	154	89	148	38	165	195	32	114	55	263	38
	25.3%	27.6%	22.6%	31.4%	28.4%	26.0%	28.4%	24.8%	16.9%	25.7%	21.2%	25.9%	29.2%
		MS	S	MRST	MS	S	MRS	S		S			

Proportions/Means: Columns Tested (5% risk level) - A/B/C - D/E/F/G - H/I - J/K - L/M/N/O/P/Q/R/S/T - U/V/W - X/Y/Z Overlap formulae used. * small base

OPEN-ENDED RESPONSE ANALYSIS

C5. Do you have any specific suggestions for enhancing existing, or adding new amenities or services?

C5 CODES			
	Total:	914	
Code	Code	#	%
Additional Or Expanded Facilities	1	125	14%
Amenity Upgrades	2	219	24%
Building Modernization	3	44	5%
Cost Concerns	4	214	23%
Guest Passes And Fees	5	48	5%
Menu Variety And Pricing	6	91	10%
Quality Of Services	7	25	3%
Overcrowding	8	37	4%
Maintenance And Service Efficiency	9	50	5%
Other	10	37	4%
Recreational Programs And Classes	11	24	3%

OPEN-ENDED RESPONSE ANALYSIS

D4. What other opportunities should the association pursue in the next year to create more community and enjoyment?

D4 CODES				
	Total:	492		
Code	Code	#	%	
Community Groups And Clubs	1	38	8%	
Downhill Ski Lodge	2	18	4%	
Fee Reductions	3	76	15%	
Harmony And Conflict Resolution	4	25	5%	
Integration With Wider Community	5	17	3%	
New Recreational Facilities	6	62	13%	
Other	7	51	10%	
Seasonal Activity Expansion	8	167	34%	
Youth And Teen Engagement	9	22	4%	
Communication	10	16	3%	

OPEN-ENDED RESPONSE ANALYSIS

F6. Is there anything else you would like to tell us?

F6 CODES				
	Total:	381		
Code	Code	#	%	
Community Pride	1	53	14%	
Expenditure On Amenities	2	108	28%	
Financial Management	3	54	14%	
Governance And Decision-making	4	79	21%	
Insurance And Safety	5	23	6%	
Other	6	26	7%	
Second Homeowner Relations	7	11	3%	
Short-term Rental Concerns	8	27	7%	





NEXT STEPS

- Staff is wrapping up the internal analysis and sharing of all open-ended feedback within the director team
- Per the 2024 Annual Strategic Objectives, staff are using the themes of the member value survey question to identify areas of improvement and continue to build a member value programming plan
- Staff are using data from this survey (and others) in the Amenity Access Policy review
- Staff will use this data from this survey, and other performance metrics, to inform planning and the 2025 Annual Strategic Objectives development ahead of the 2025 budget process

THANK YOU

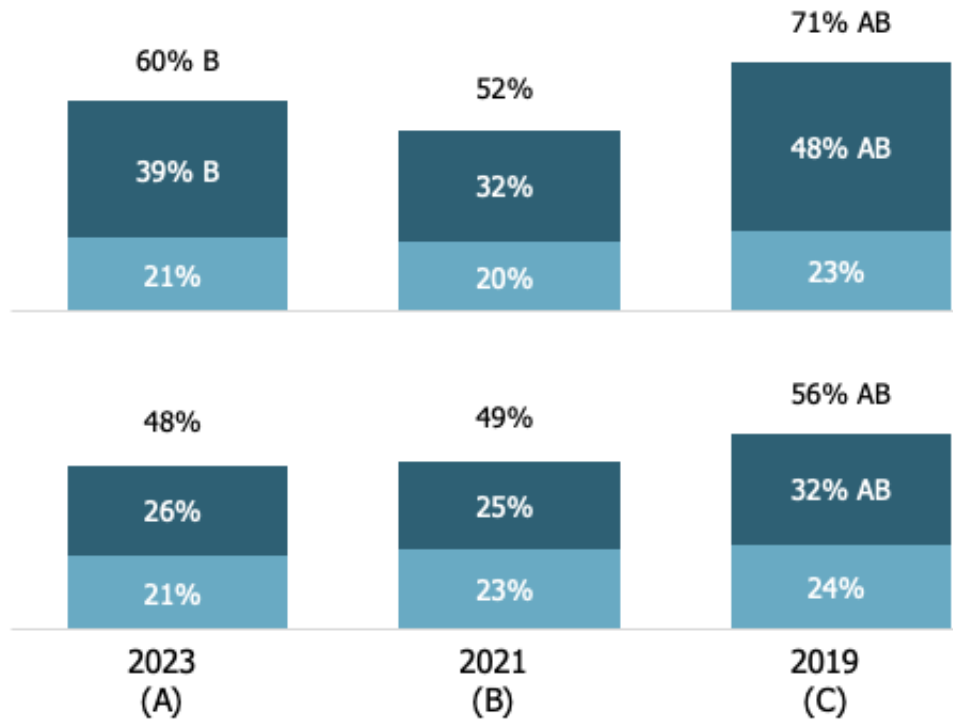
REFERENCE MATERIALS

Value perceptions of Rec fees have increased since 2021 for permanent residents, and stay consistent for second homeowners, although still down significantly from 2019.

Finn has asked value perceptions using this same scale in over 1,000 studies. While we don't have norms specific to HOA fees, our benchmarks can help to interpret the strength of TD value perceptions. A top 2 box score above 56% is in the top 20% of Finn's database, indicating very high value perceptions. A score under 40% is consider below average and a score below 32% places in the bottom 20%.

Value of Tahoe Donner

Permanent Residents
2023: N=429
2021: N=485
2019: N=254



Second Homeowners
2023: N=1055
2021: N=1,394
2019: N=1,318

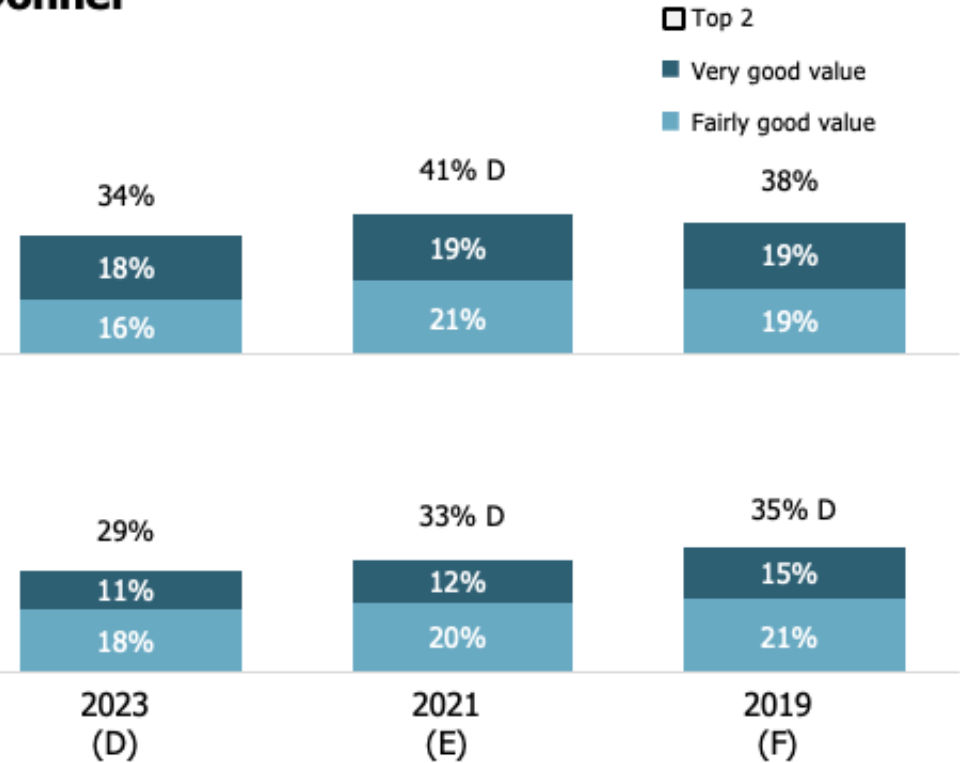
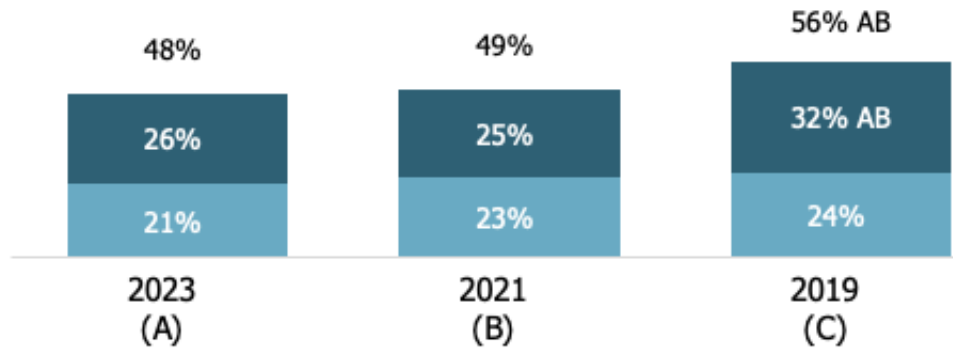


Chart Area



C1: How do you feel about the value of each of the following?

*Rec fee cost: \$295 for up to two people, \$460 for all members in 2023, \$395 in 2021 for up to four people, \$290 in 2019

**Not asked in 2019

Stat testing: A/B/C, D/E/F

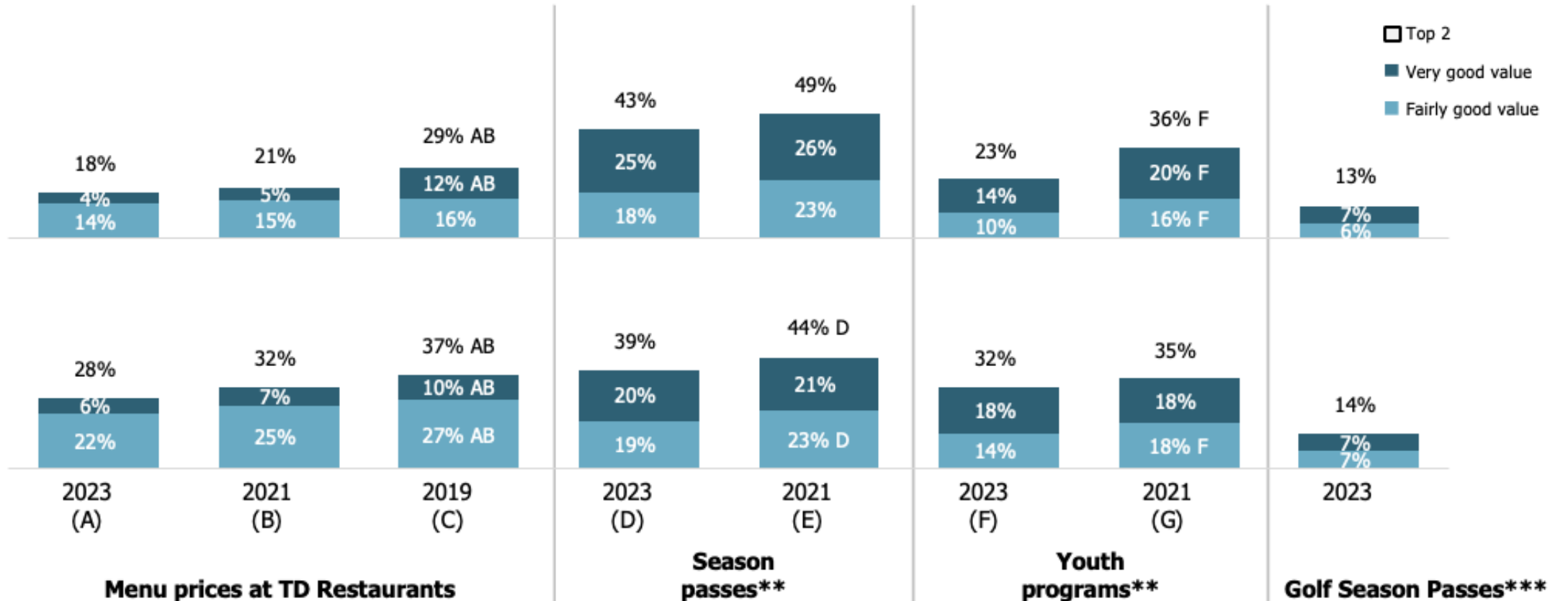
There is also a decline in value perception of menu prices since 2019. The value of season passes has declined for second homeowners, while youth programs value has decreased for permanent residents.

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Permanent Residents

2023: N=429
2021: N=485
2019: N=254



C1: How do you feel about the value of each of the following?
 Not asked in 2019, *New for 2023
 Stat testing: A/B/C, D/E, F/G